

Issue Paper Revisions to Contractor Verified Report

ISSUE:

The laws governing school construction require filing of reports by various parties verifying that construction complies with documents approved by DSA. Project certification cannot be issued in the absence of completed verified reports.

The DSA has reviewed issues related to uncertified projects, its policies and procedures, and determined, with stakeholder concurrence, that it is necessary to update various verified report templates. This effort may eliminate certain barriers to timely and accurate reporting and, thus, facilitate project certification. In general, the DSA is seeking to:

- eliminate information that is not required by law and regulations;
- align reported information with responsibilities prescribed by law and regulations; and,
- eliminate any ambiguities with required content of the form.

For the contractor's verified report, recent regulation changes require that the contractor's verified report be updated to remove reporting of final contract cost and number of change orders. Specifically, newly adopted regulations do not require that DSA receive any change orders on a project and that the owner must file a statement of final project cost with the DSA. Therefore, it is no longer appropriate for contractors to report the total number of change orders on a verified report.

BACKGROUND:

At the March 15, 2012 meeting, the Committee discussed potential changes to the contractor verified report including the following:

- eliminating reporting of final contract cost;
- eliminating reporting of total number of change orders received by contractor;
- defining contract completion for purposes of filing the final verified report; and,
- modifying the format to facilitate reporting for projects using multi-prime construction manager (CM) contracts.

At the April 30, 2012 meeting, the DSA presented a draft of the contractor's verified report. The Committee suggested several modifications, which are summarized below.

SUMMARY OF PROPOSED FORM CHANGES:

This version is designed for traditional project delivery method (i.e. design-bid-build); the multi-prime CM template will be developed and presented at a future meeting of the Committee for feedback.

1. Added a field for contractor's license number.
2. Provided instruction at the end of the form that directs the contractor to submit a copy of the verified report to the project inspector in accordance with newly effective regulations.
3. Replaced the term "DSA approved plans and specifications" with "DSA approved construction documents", in part 5, to account for deferred submittals and construction change documents.
4. Retained the wording in the affidavit regarding "work during the period covered by this report" in part 4 of the report, as the contractor may be filing reports that are specific to a certain time period and/or may pertain to only the portion of the project, rather than the entire project construction.



VERIFIED REPORT – Contractor

This form shall be completed by each contractor having a contract with the owner, upon occurrence of any of the following listed in Section 1 below, in accordance with California Code of Regulations, Title 24, Part 1, Sections 4-220 (for essential services buildings) and 4-343 (for schools).

DSA File No.: _____ - _____

DSA Application No:
_____ - _____

School District/Owner: _____ Project Name (School): _____

Name of Contractor (company/firm) submitting this report: _____
operating as (*check appropriate box*):

☐ General Contractor responsible for the entire project scope as contained in DSA approved plans and specifications; OR

☐ Contractor responsible for partial scope of the project. *Describe scope of work in contract:*

Contractor's License Number: _____ Business Address: _____

City: _____ CA Zip _____

1. Reason for filing this Verified Report (Check only one of the following & complete information for the selected item):

A. ☐ Contract completion (Final Verified Report)

B. ☐ Termination of contract prior to completion of all work in the contract
Provide last date of work: _____ and complete Section 4 below.

C. ☐ DSA Request dated _____. *Complete Section 4 below.*

2. Check appropriate Box. One of the following must be checked in order for the contractor to file a Final Verified Report:

☐ DSA approval for this project does not require deferred submittals within the scope of my contract; OR,

☐ Any and all deferred submittals within the scope of my contract are approved by DSA, as known to me on the date of this report.

3. Check one of the following and provide required documentation:

☐ Any and all outstanding deviation notices pertinent to my contract were resolved prior to contract completion, as known to me on the date of this report; OR,

☐ I have attached a copy of any unresolved deviation notices pertinent to my contract and status of any pending resolution, as known to me on the date of this report.

4. Scope of contract remaining (not completed) as of the last date work:

5. I attest that based on my own personal knowledge* that the work during the period covered by this report has been performed and materials have been used and installed, in every material respect, in compliance with the DSA approved construction documents. I declare under penalty of perjury that I prepared this report and that all statements are true.

Signature: _____

Date: _____

Print Name: _____ Job Title: _____

E-mail address: _____ Phone Number _____

* "Personal knowledge" means the personal knowledge which is obtained from the construction of the building. The exercise of reasonable diligence to obtain the facts is required by law.

Submit completed form to the DSA Regional Office where this project was constructed and provide a copy to the project inspector.

☐ DSA Oakland Region
1515 Clay Street, Suite 1201

☐ DSA Sacramento Region
1102 Q Street, Suite 5200

☐ DSA Los Angeles Region
700 N. Alameda Street, Suite 5-500

☐ DSA San Diego Region
10920 Via Frontera Rd., Suite 300

Oakland, CA 94612

Sacramento, CA 95811

Los Angeles, CA 90012

San Diego, CA 92127